



FINANCIAL SERVICES BUSINESS DATA TECHNOLOGY



BUSINESS TECHNOLOGY AND DATA

MODEL MANAGEMENT		CROSS-ASSET TRADING & EXECUTION		MIDDLE OFFICE & POST-TRADE	
Delivery	Wide Product Support	Rebalancing (Ad-hoc & automated)	Commission Management	Equity	Fixed Income (Generics & Dealer Inventory)
Flexible Hierarchies	Approval Tracking	Cash Allocations	Manager Communication		
Tailored Mandates	Suitability Matching	Tax Management	Account Instructions	Derivatives	Mutual Fund Processing
MONITORING & REPORTING	Performance (UMA & Sleeve)	Compliance	Drift Reporting	Exception Monitoring	Strategy Composites
POSITION MANAGEMENT	Sleeve Accounting	Real-Time Cash/Positions	Reconciliation	Corporate Actions	Flexible Hierarchy
DATA	Reference	Real-time Prices	End-of-Day & Evaluated Pricing	Analytics	Benchmarks
ACCESS & CONNECTIVITY	Mobile	Browser	Windows Desktop	Wealth Hub	

Solutions and Data

Institutional investors and wealth managers today are challenged by the depth and breadth of data available to them. Our innovative solutions provide a seamless environment for collecting, curating and validating data. By providing you with integrated, high-quality data, we help you to make better-informed decisions and effectively manage operations with easily accessible, real-time information.

State Street Alpha® Data platform

Our integrated front-to-back platform provides a centralized, single source of truth across your enterprise, helping you gain quick access to data insights and mitigate risks. Its open and interoperable data streamlines your data environment and its extendible data model enables integration of your data with third-party services.

State Street Alpha Data services

Our operations control framework uses the power and flexibility of the Alpha platform to support your unique demands. We provide industry-standard transparency for enterprise-wide data. With our global footprint, we support you across multiple time zones and geographies.

Data you can trust. Insights you can use.

Led by a team of 400 AI practitioners, and with six recently won patents, State Street's 230 years of innovation continues to elevate

All operations on all cylinders.

Curate data more effectively and say goodbye to fragmented workflows.

Data speed, accuracy and action.

You need clean data and actual insights, and you need it fast. Nothing short of that is useful. Synthesize data and identify anomalies

Responsibility. Perhaps the most important ability.

With an industry-leading vision and centuries of expertise, State Street has the scale, depth of resources, technology and responsibility

How to deploy artificial intelligence across the investment process Institutional investors in the age of AI

From a study of more than 500 investment professionals, State Street quantifies

AI

✦ Artificial intelligence is a machine's ability to perform some cognitive functions we usually associate with human minds.

✦ Humans and machines: a match made in [productivity](#) heaven. Our species wouldn't have gotten very far without our mechanized workhorses. From the wheel that revolutionized agriculture to the screw that held together increasingly complex construction projects to the robot-enabled assembly lines of today, machines have made life as we know it possible. And yet, despite their seemingly endless utility, humans have long feared machines—more specifically, the possibility that machines might someday [acquire human intelligence](#) and strike out on their own.

✦ But we tend to view the possibility of sentient machines with fascination as well as fear. This curiosity has helped turn science fiction into actual science. Twentieth-century theoreticians, like computer scientist and mathematician Alan Turing, envisioned a future where machines could perform functions faster than humans. The work of Turing and others soon made this a reality. Personal calculators became widely available in the 1970s, and by 2016, the US census showed that [89 percent of American households](#) had a computer. Machines—*smart* machines at that—are now just an ordinary part of our lives and culture.

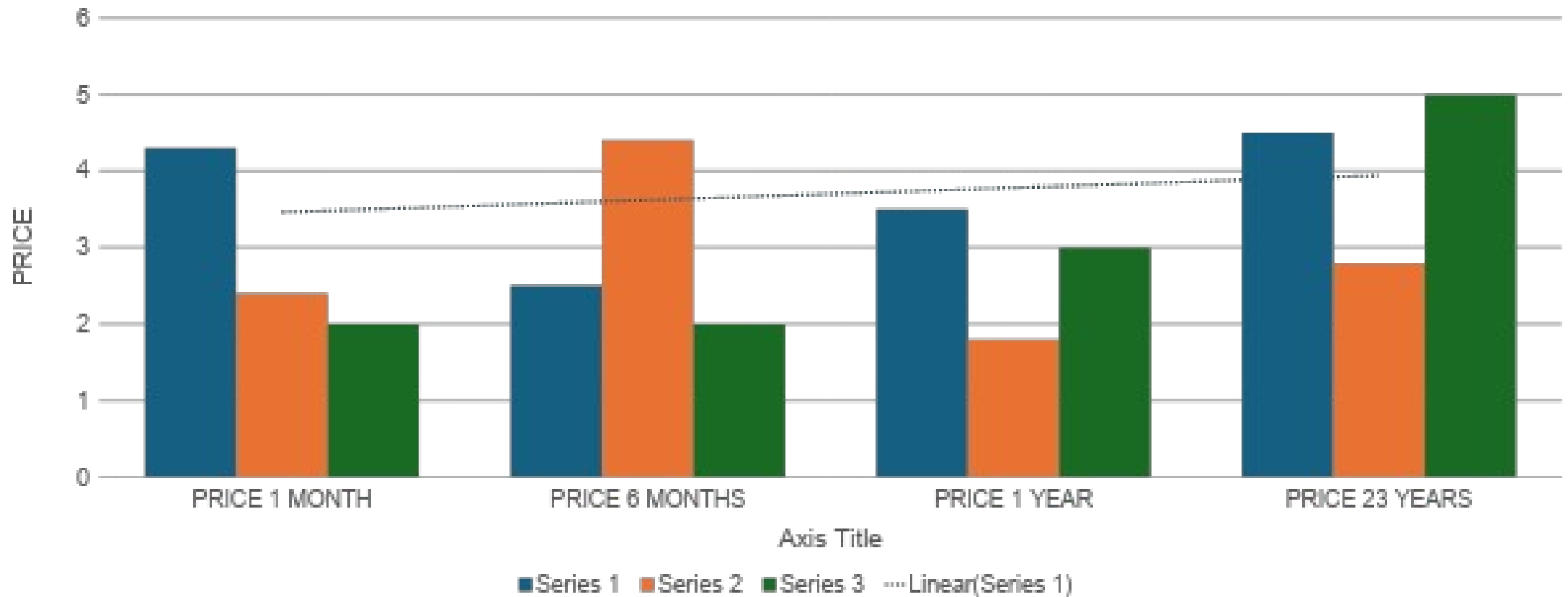
✦ AI is a machine's ability to perform the cognitive functions we associate with human minds, such as perceiving, reasoning, learning, interacting with the environment, problem-solving, and even exercising creativity. You've probably interacted with AI even if you don't realize it—voice assistants like Siri and Alexa are founded on AI technology, as are some customer service chatbots that pop up to help you navigate websites.

STATE STREET STOCK PRICE.

TABULAR DATA

Date	11/29 10:16	
DATE	Date	11/29 10:18
Advanced Chart	Close	98.89
Open	Open	98.92
High	High	98.93
Low	Low	98.88
Volume	Volume	2,636

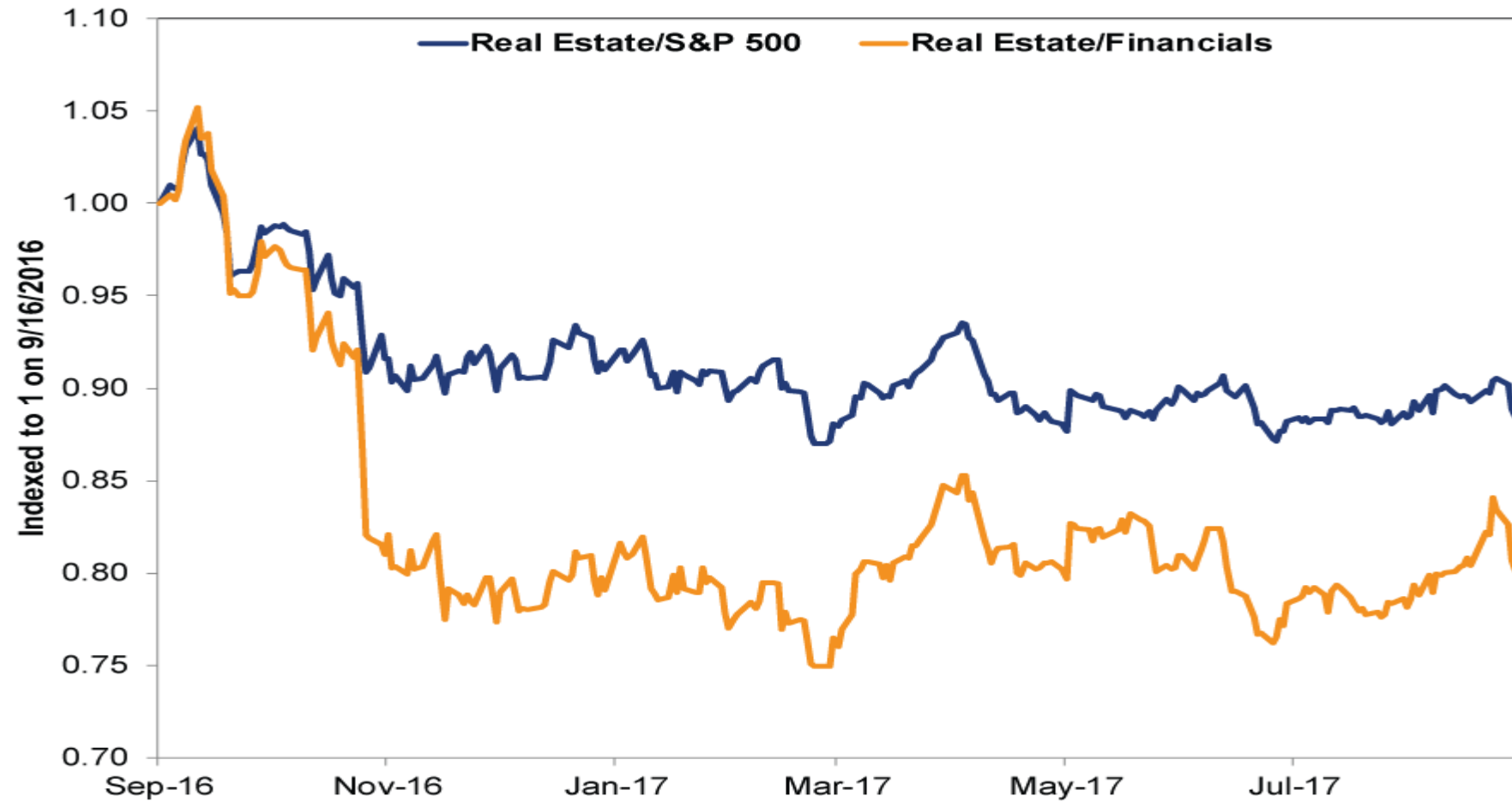
DESCRIPTIVE STATISTICS BAR CHART



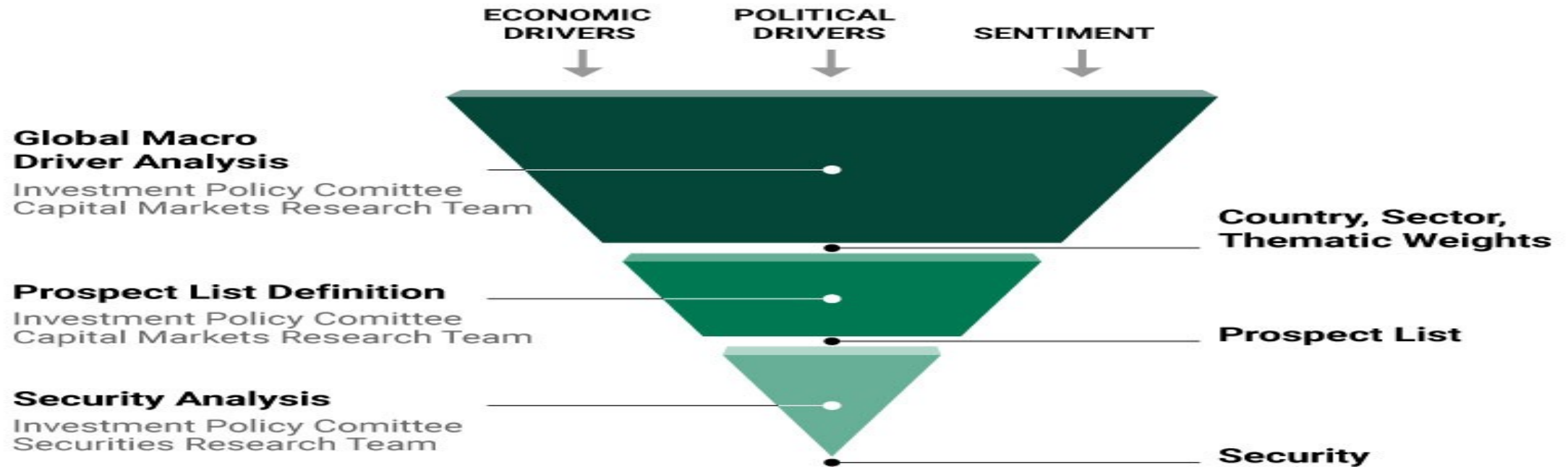
S&P 500

REAL ESTATE FINANCIALS DESCRIPTIVE STATISTICS ARTICLE 3 CHART

A fancy finance product



Portfolio Construction Starts With a Macro Perspective



FISHER INVESTMENTS

Founded in 1979 fisher investments from the start has Minimized capital investments capitalism and free capital markets, and managed discretionary assets with a fundamental belief in free capital markets.

- **Real GDP is estimated to have increased by 0.1% in Quarter 3 2024**
- **UK, Quarter 1 (Jan to Mar) 2023 to Quarter 3 (July to Sept) 2024**
- Q1 2023 Q3 2023 Q1 2024 Q3 2024
- -0.4 -0.3 -0.2 -0.1 0 0.1 0.2 0.3 0.4 0.5 0.6 0.7 0.8
- %
- **Q3 2024**
 - GDP first quarterly estimate: 0.1
- **Source: GDP first quarterly estimate from the Office for National Statistics**

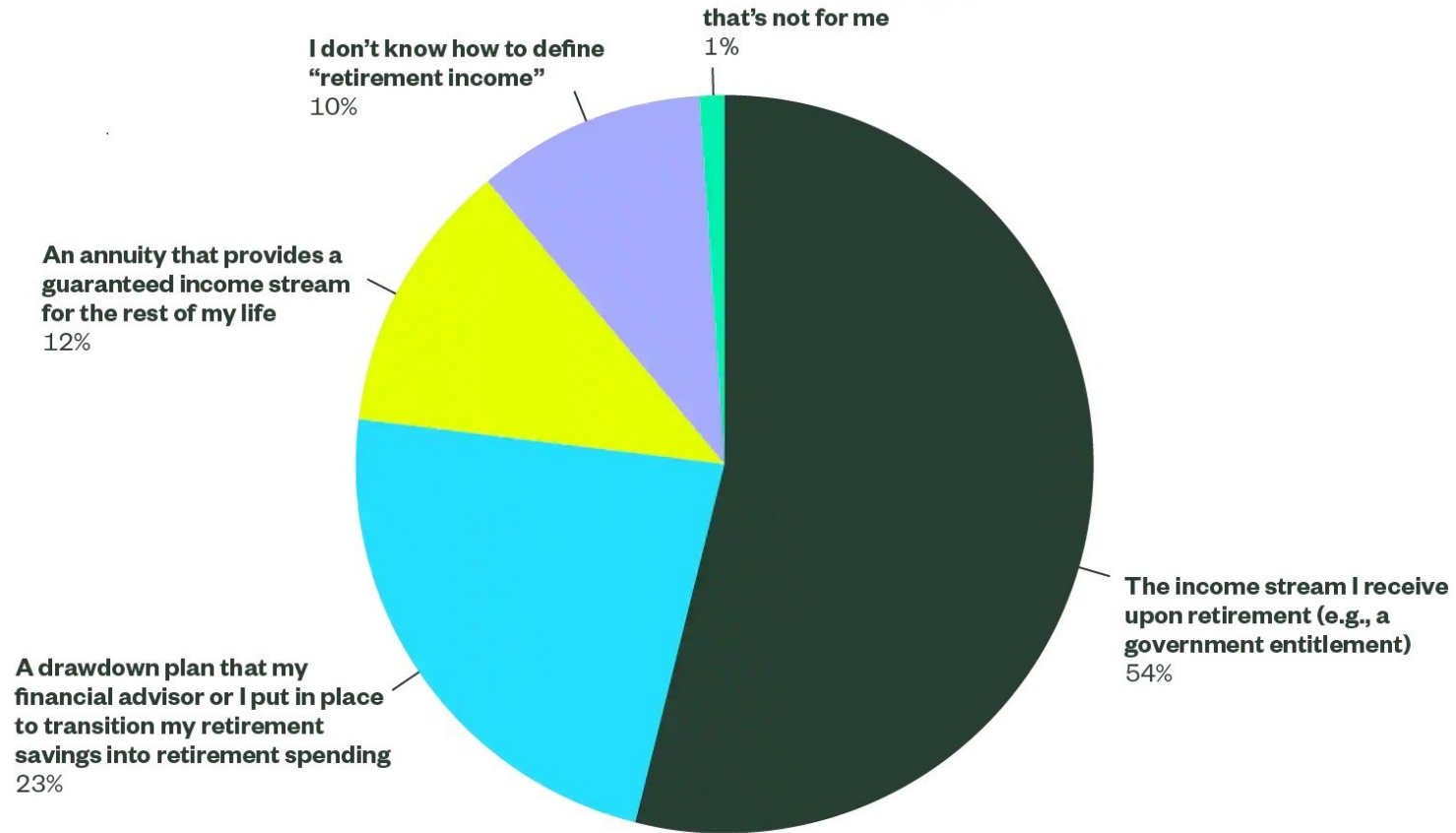
1.Q1 refers to Quarter 1 (Jan to Mar), Q2 refers to Quarter 2 (Apr to June), Q3 refers to Quarter 3 (July to Sept) and Q4 refers to Quarter 4 (Oct to Dec).

2.Chart shows the quarter on previous quarter growth (%).

3.No periods are open to revision in this publication.

RETIREMENT PIE CHART

NEW YORK TIMES ARTICLE 4



Source: State Street Global Advisors. GR3 2022 survey of 3,553 savers between July 20, 2022 and August 22, 2022.

ARTICLES

WALL STREET JOURNAL

MARKETWATCH

FINANCIAL TIMES